Market MINUTE

COMMODITY TRENDS

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VAN EERDEN FOODSERVICE

COMMODITY REPORTS

UNIPRO

PRO*ACT

GROCERY

SUGAR

WHEAT

SOYBEAN OIL

WHEAT | Wheat and flour markets remain steady as U.S. harvest pressure and solid supply balance global uncertainty. While core wheat pricing is stable, downstream items like pasta and baked goods continue to trend higher due to elevated input costs such as labor and energy. Operators should expect limited near-term volatility in flour, but continued cost pressure across finished wheat-based products.

OILS & SHORTENING | Oil and shortening markets remain firmly elevated as tight global supply and strong demand continue to drive pricing higher. Soybean oil is supported by consistent domestic usage, including biofuel demand, while palm oil markets are facing ongoing production and export challenges out of key regions in Southeast Asia. These pressures are keeping overall edible oil markets tight, limiting any near-term relief. Shortening is following the same upward trend, as it relies heavily on blended oil inputs that are all experiencing cost increases.

SUGAR | Sugar markets are trending slightly lower as improved global production and steady supply help ease recent pricing pressure. Strong harvests in key regions are softening raw sugar, while refined sugar remains stable with balanced demand. Corn syrup and alternative sweeteners are holding steady as substitution keeps overall usage consistent. For operators, sugar is offering some relief, though pricing remains elevated historically and should be monitored for weather or export-related shifts.

DAIRY & EGGS

EGGS

BUTTER

CHEESE BLOCKS

CHEESE BARRELS

BUTTER | Butter markets continue to trend higher as strong demand and tight cream availability support elevated pricing. Seasonal shifts in milk production are limiting cream supply available for churning, while foodservice and retail demand remain steady. Cheese and fluid milk markets are more balanced, helping stabilize those categories despite butter volatility. For operators, butter remains a key cost pressure item, with limited short-term relief expected as supply constraints continue to outweigh production gains.

CHEESE | Cheese markets are mostly steady, with block and mozzarella pricing holding in a balanced supply environment. Barrel cheese is seeing slight upward pressure due to stronger processing demand. Milk supply is adequate, keeping overall production stable, but consistent demand is limiting downside movement. For operators, expect generally stable pricing with minor upward pressure in processed cheese costs.

EGGS | Egg markets remain steady at relatively low levels, supported by ample supply and balanced demand. Production continues to meet market needs, keeping availability consistent and preventing price volatility. Unlike other protein and dairy categories, eggs are seeing minimal disruption, with stable inventories helping maintain predictable pricing. With no major supply constraints or demand surges on the horizon, the market is expected to remain flat in the near term, making eggs a reliable and cost-effective option for operators.

CENTER OF THE PLATE

CHICKEN | BEEF | PORK

CHICKEN | Chicken markets are showing slight softness, with breast and tender pricing easing as production remains strong and demand levels off after recent seasonal peaks. Wings are firm as demand increases, particularly across foodservice channels. Whole bird pricing is also stable, supported by balanced supply and steady retail movement. For operators, chicken continues to offer relative value compared to other proteins, with favorable pricing on key cuts helping offset higher costs in beef and turkey.

BEEF | Beef markets remain elevated as tight cattle supplies continue to limit overall production and keep pricing under pressure. Strong seasonal demand is driving increases on middle meats like ribeye and strip loin, while ground beef is also trending higher due to reduced trim availability. Chuck is showing more stability, offering operators a potential value option compared to premium cuts. With herd sizes still historically low and no immediate supply relief expected, the market is likely to remain firm.

PORK | Pork markets are generally balanced, with loins and hams holding steady due to consistent supply and demand. Bellies and ribs are trending higher as seasonal demand remains strong, particularly across foodservice channels. Overall production remains adequate, helping keep broader market volatility in check. For operators, pork continues to offer relative value compared to beef, though select cuts tied to grilling and bacon are seeing upward pressure.

NON-FOODS & BEVERAGE

TAKE-OUT SOLUTIONS | COFFEE & BEVERAGE | GLOVES | CAN LINERS | CHEMICALS

PACKAGING CHALLENGES | International Resin Market increases along with rising pulp and paper costs, continued escalating and volatile global oil prices, disruption in Middle East shipping lanes due to strait closures, increasing transportation costs (due to extend¬ed transit times and higher fuel costs), manufacturing, raw material costs (HDPE resin, caustic soda, and glycol ethers), global sourcing shifts, and tariff-related impacts on imports are all contributing to price increases from suppliers. Increases have been implemented in May/June and several suppliers have announced another round of increases for July/August.

FRUITS & VEGETABLES

TOMATOES | AVOCADO | POTATOES | LETTUCE

CROP OUTLOOK | Produce markets remain mixed as weather patterns and regional growing conditions continue to drive variability across key commodities. Lettuce pricing remains elevated due to reduced yields, quality concerns, and ongoing supply gaps during growing region transitions, keeping availability tight. Tomatoes are trending slightly higher as demand improves and supply begins to tighten modestly across key regions, though overall availability remains solid. Potato markets remain steady with ample storage inventories and consistent demand maintaining stability. Avocado pricing continues to hold at elevated levels as import variability, sizing challenges, and strong foodservice demand persist. Citrus markets are easing, supported by strong production levels and improved sizing, increasing overall availability. For operators, leafy greens and avocados will remain the most cost-sensitive categories, while tomatoes are beginning to show slight upward movement and citrus continues to provide value opportunities.